CSLL – Caseload List

This screen displays a list of open clients and referrals for a particular worker. The worker will be able to see clients and referrals that are assigned to them, shared with them, and if read-only access has been granted to them.

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CAFSCSLL                        CASELOAD LIST                 07/14/2016    11:41
USER ID : C81285                                                    PAGE NO:    1

DISPLAY C=CLIENTS,R=REPORTS OR B=BOTH: B     VIEWING CASELOAD OF USER: C81285
TO SELECT, ENTER S=SELECT, R=RELEASE OR T=TRANSFER

    REPORT/                                  --ASSIGNMENT--- PERM ALRT R&R/
SEL CAPS-ID   NAME                             DATE       TYP GOAL IND  CLNT   CPHL
 _  00001165 BRINKER, BONNIE                 09/09/13      S   RTH        C      P
 _  00001166 GREEN, GREGORY                  09/09/13      A   RTH        C      P
 _  00001167 HUDSON, HENRY                   09/09/13      S   RTH        C      P
 _  00001212 PICKLE, PAUL                    12/18/13      S   RTH        C      P
 _  00001163 PINK, PENNY                     09/09/13      S   RTH        C
 _  00001131 BARKER CHILD                    10/03/14      A              R
 _  00001130 DINKLE KIDS                     10/03/14      A              R
 _  00001169 NEIGHBOR CHILD                  06/24/16      A         Y    R
 _  00001112 NEIGHBOR CHILD                  05/15/14      A              R




                                                                      PATH: _
```

Field Descriptions (F12) indicates code lookup is available.

DISPLAY C=CLIENTS, R=REPORTS OR B=BOTH
This field will default to "B" so both clients and reports will be displayed (all clients will be listed first followed by all reports.) Enter a "C" if you wish to view only clients or enter an "R" if you wish to view only reports.

VIEWING CASELOAD OF USER
This field will default to the C number of the worker who is logged in to the system. You can enter the C number of another worker to view their caseload. *In order to view the caseload of another worker, you must be in the same county and have the same supervisor. Supervisors and Regional Administrators can view the caseload list of any worker in their county and/or region.*

SEL
On the select line, enter “S” if you want to select a client or report to access additional details, “R” if you want to release shared or read-only access to a client or report, or “T” if you want to transfer a client or report to another worker.

REPORT/CAPS-ID
This field will display the CAPS ID for a client and the report number for a report.

NAME
This field will display the name of the client (ID=CAPS ID) or the name of the report (ID=report number.)

ASSIGNMENT DATE
This field will display the date the client or report was assigned, shared or transferred to you.

ASSIGNMENT TYPE
This field will display the type of assignment/access you have for a client or report. “A” = assigned, “S” = shared, “R” = read-only. Read-only records will also be highlighted in pink.

PERM GOAL (F12)
This field will display the most current permanency goal for the client. This information is defaulted from the most current review listed on the IARL (Initial Assessment and Review List) screen.

ALRT IND
This field will display a “Y” if there are alerts related to the client or report on the ALER (Alerts) screen.

R&R/CLNT
This field will display a “C” if this is a client or an “R” if this is a report.

CPHL
This field will display a “P” if the client is currently in an open placement. This information is defaulted from the CPHL (Client Placement History List) screen.

Additional Information

You can only release clients and reports that you have shared or read-only access to. In order to remove an assigned client from your caseload list, they must be transferred to another worker or closed on the IARD (Initial Assessment and Review Detail) screen. In order to remove an assigned report from your caseload list, it must be transferred to another worker or closed on the RRD1 (Report/Request Detail 1) screen.

When a client or referral has been released, it will continue to display on your caseload list until the next day.

You can select multiple clients and/or reports with a “T” to transfer. You will be taken to the AXED (Assignments/Transfers Detail) screen and you can enter the C# of the worker you are transferring each detail to.

When you have entered a closure review on the IARD (Initial Assessment and Review Detail) screen to close a client, the client will remain on your caseload list until the review has been approved by your supervisor.

If you select a client or report with an “S” you will be taken to the CLID (Client Detail) screen for a client and the RRD1 (Report/Request Detail 1) screen for a report.